technical assistance workshops

IN WASHINGTON, D.C.

WORKSHOP SCHEDULE

JULY 1, 1972-
JUNE 30, 1973

WORKSHOP MATERIALS

GENERAL SERVICES ADMINISTRATION
NATIONAL ARCHIVES AND RECORDS SERVICE
OFFICE OF RECORDS MANAGEMENT

Richard M. Nixon
President of the United States

Arthur F. Sampson
Acting Administrator of General Services

James B. Rhoads
Archivist of the United States

TECHNICAL ASSISTANCE WORKSHOPS

July 1, 1972 through June 30, 1973

The National Archives and Records Service (NARS), General Services Administration, develops workshops as a part of its Government-wide responsibility (44 USC, Chapters 27-33) for promoting cost reduction and increased efficiency in Federal paperwork and information management.

The NARS workshops differ significantly from the usual training courses and seminars, and are designed primarily for Government employees whose responsibilities and duties within their agency will make it possible for them to personally apply the knowledge and skills gained from the workshop. The NARS workshops, therefore, include numerous exercises in which the attendees are required to participate in solving actual or simulated paperwork problems. Also, extensive use is made of graphics in order to hasten the learning process and simplify the workshop presentations. Further, the participants are furnished a variety of guides and other aids, including the related Records Management handbooks, to provide them with the proper background material and tools to carry out the project when they return to their agency.

WORKSHOP PRESENTATIONS

(1) At NARS, Washington, D. C. The workshops conducted by NARS central office personnel, with a few exceptions as explained in the workshop descriptions which follow, are intended for management analysts, agency officials who will be giving the workshops in their own agency, or those who have managerial responsibilities in the paperwork area covered by the workshop. There is no charge for attendance at these workshops.

(2) At Government agencies, by agency personnel. In order to reach a greater audience and thus accelerate the application of improved paperwork concepts and techniques, Government agencies are urged to conduct their own workshops. In addition, this provides an excellent means for developing in-house expertise, since the instructors, in the course of conducting the workshops, usually become highly knowledgeable in the subject matter fields in which they teach. NARS will supply the instructor's manuals, workshop graphic materials, and student kits, charging only for the reproduction and packaging costs. A complete description of workshop materials is included at the back of this pamphlet.

(3) At Government agencies, by NARS central office personnel. NARS central office personnel will conduct onsite workshops at agency locations upon request of agency officials. Normally, the agency will be required to reimburse NARS for the cost of providing the instructor. The charge is approximately $135 per workshop day and

"get ready" time, plus travel and per diem, if applicable. NARS central office will also provide instructors, on the same basis, for assisting agencies in launching their own workshops. Agencies desiring to avail themselves of this service should contact the Workshop Director whose address and telephone number appear below.

(4) <u>At field locations by GSA regional records management personnel.</u> Workshops are also conducted by NARS regional office personnel. Inquiries should be directed to the appropriate NARS Regional Director.

HOW TO APPLY FOR WORKSHOPS AT NARS, WASHINGTON, D. C.

An Optional Form 37, "Nomination-Registration for Training," (August 1964) or "Nomination for Interagency Training," (July 1969) should be used to apply for each workshop. Nominations should be received by NARS not later than 15 days before a workshop begins. Workshops will be limited to 25 participants. Applications or requests for information concerning the procurement of workshop materials should be addressed to:

> Workshop Director
> National Archives and Records Service (NRP)
> General Services Administration
> Washington, DC 20408 (Stop 220)
>
> Phone: (202) 963-4154 or Code 13, ext. 34154

Workshops scheduled in this announcement will be held in the Training Room, ground floor, Interocean Building, 512 9th Street, N.W., Washington, D. C.

Agency officials responsible for selecting nominees are urged to screen carefully all applications to insure that they satisfy eligibility requirements as explained in the individual workshop descriptions which follow.

TITLE AND DESCRIPTION (WORKSHOP NUMBERS ARE SHOWN IN PARENTHESES)	DATES
RECORDS MANAGEMENT (1A): A 2-week workshop designed to provide a broad perspective of the scope and objectives of records management as a whole. The principal topics analyzed through lectures and discussions are: managing records, correspondence, directives, reports, forms, and mail; records scheduling; records disposition; office machine selection and utilization; source data automation; clerical work measurement; vital records handling; information retrieval developments; conducting a total records systems study; and do's and don'ts of an effective records management program. Records officers, management analysts, supervisors, and others who have broad responsibility for management of the program areas listed above are eligible. (Individuals attending workshop 1B should not attend this workshop.)	Jan. 22 - Feb. 2, 1973

TITLE AND DESCRIPTION (WORKSHOP NUMBERS ARE SHOWN IN PARENTHESES)	DATES

RECORDS MAINTENANCE AND DISPOSITION (1B): A 5-day workshop covering the following areas of records management: files operations, such as subject classification, records inventorying, scheduling, and storage (including a tour of the Washington National Records Center, Suitland, MD); mail management; vital records protection; office information retrieval; conducting an effective records systems study; and do's and don'ts of an effective records program. Management technicians, records liaison personnel, records supervisors, and similar personnel who have records management responsibility for one or more of the functions listed are eligible. (Individuals attending workshop 1A should not attend this workshop.)

Nov. 13-17, 1972
May 14-18, 1973

FORM AND GUIDE LETTERS (2A): Three half day sessions designed to improve productivity, reduce costs, and achieve simplicity and standardization in the preparation of repetitive correspondence. Demonstrations and simulated problems highlight the development of a predesigned reply system that includes both guide (pattern) letters and form letters. Management analysts, persons who will be serving as instructors, or those having managerial responsibility for operations where letterwriting is a significant part of the workload are eligible.

Feb. 21, 22, 23, 1973
(mornings only)

CORRESPONDENCE MANAGEMENT (2B): A 2-day workshop explaining when a correspondence management program is needed and how to develop one. It deals with the costs of written communications, how to reduce these costs, and how to prepare letters that are clear, concise, and effective. Management analysts, persons who will be serving as instructors, or those having managerial responsibility for preparation of correspondence are eligible.

Oct. 26-27, 1972

SPEEDING THE MAIL (2C): Two half day sessions concerning the handling of incoming correspondence and the clearing of replies. Methods are discussed by which shorter in-shop time for correspondence requiring a reply can be achieved. How and where improvements can be made is determined. Management analysts, persons who will be serving as instructors, or those who have managerial responsibilities in offices having a large volume of mail are eligible.

March 26-27, 1973
(mornings only)

FORMS ANALYSIS AND DESIGN (3A): A comprehensive 10-day workshop covering how to establish and operate a forms management program and the relationship of this program to other records management programs. The workshop shows how to analyze and design forms as an efficient means of recording, collecting, transmitting, and processing

Sept. 18-29, 1972
Apr. 30-May 11, 1973

TITLE AND DESCRIPTION (WORKSHOP NUMBERS ARE SHOWN IN PARENTHESES)	DATES

information. Also included are the development of forms specifications, flow charting procedures, and the application of the survey approach to forms design. Forms analysts and trainees, forms liaison representatives, forms managers, and others needing a technical knowledge of forms analysis and design methods are eligible.

FORMS IMPROVEMENT (3B): Two half day sessions presenting and applying techniques to smooth the flow of paperwork by simplifying and improving the forms used. Effective principles for improving, simplifying, combining, and eliminating forms are discussed and used. Participants redesign and simplify a heavy-usage form. Management analysts, persons who will be serving as instructors, or managerial personnel concerned with the problem of forms management are eligible.

Mar. 12-13, 1973 (mornings only)

FORMS FOR AUTOMATION (3C): A comprehensive 5-day workshop designed to acquaint participants with requirements, specifications, and practical techniques and applications for developing efficient, economical forms for use in processing information in conjunction with ADP equipment. Special projects provide practical experience in applying the standards and techniques discussed. Participants should either have attended workshop 8B, "Mechanizing Paperwork Systems," or be well versed in automation. In addition, they should either have attended workshop 3A, "Forms Analysis and Design," or be experienced in basic forms management principles and techniques. Forms analysts and others directly involved in the preparation of forms for ADP equipment are eligible.

Apr. 2-6, 1973

DIRECTIVES SYSTEMS IMPROVEMENT (4A): A 2-day workshop designed to improve the communication of policy, procedures, and instructions in the clearest, most effective manner. It concentrates in the areas of directives planning, organizing, writing, illustrating, and editing. Management analysts, persons who will be serving as instructors, or those who manage directives systems are eligible.

June 21-22, 1973

MODERNIZING MANAGEMENT REPORTS (5A): A comprehensive program presented in five half day sessions concerning the continuing need for better management information and reporting. The workshop focuses on management information requirements. It demonstrates and develops ways to get the desired information at the right time

Nov. 27 - Dec. 1, 1972 (mornings only)

TITLE AND DESCRIPTION (WORKSHOP NUMBERS ARE SHOWN IN PARENTHESES)   DATES

through the clearest possible communication. It stresses
how to stop unneeded reporting to achieve the lowest
possible cost. Case histories illustrate application
of the workshop techniques. Participants, working in
groups, consider real or theoretical problems of
their agencies. Groups of four registrants from a
single agency provide the most effective pattern to
study practical problems. Management analysts, reports
managers and others having managerial responsibilities
relating to development, preparation, or utilization
of reports are eligible.

INFORMATION SYSTEMS DESIGN (5B): A 5-day workshop designed
to acquaint the participants with methods for developing
a large information system. The workshop covers the   Mar. 19-23,
various steps of system design, identification of informa-   1973
tion requirements, organization of data, network analysis,
input and output methods, preparing systems proposals
and specifications, testing, and measuring benefits.
Participants work in groups to solve the problems of a
fictional transit agency. When the workshop is con-
ducted within an agency, participants consider its
actual problems. Previous participation in the "Moderni-
zing Management Reports" workshop is desirable.
Management analysts, reports managers and others having
managerial responsibilities relating to development,
preparation, or utilization of reports are eligible.

REPORTS IMPROVEMENT (5C): A 1-day workshop designed
to assist individuals who require management reports
or who otherwise have some influence on making improve-   June 19, 1973
ments in a reporting system. Prior to attending the
workshop, each participant will gather copies of
reports familiar to him and bring them to the work-
shop. Using the techniques of the workshop, the
participant will identify those reports which can
be improved. Management analysts, reports managers
and others having managerial responsibilities relating
to development, preparation, or utilization of reports
are eligible.

OFFICE INFORMATION RETRIEVAL (6A): A 5-day workshop
designed to show how and under what circumstances
modern information methods and equipment may be applied   Apr. 16-20,
to improve dissemination, storage, and retrieval of   1973
information. Participants are introduced to the
techniques and systems in use today and some of those

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being developed. They are shown how to conduct infor-
mation retrieval surveys, how to design a coordinate
index system, and how to select the appropriate system
and equipment. Management analysts, persons who will
be serving as instructors, systems personnel, and
others who may be directly involved in designing and
installing an information retrieval system are eligible.

FILES IMPROVEMENT (7A): A 2-day workshop designed to
help Government offices save time and money through
effective filing systems. Participants develop   Jan. 17-18,
solutions to problems simulating actual filing   1973
situations. Management analysts, persons who will
be serving as instructors, or those with broad
responsibility for files management are eligible.

RECORDS DISPOSITION (7B): A 1-day workshop concerned
with the major practices, procedures, and programs
related to effective records disposition. The work-   May 31, 1973
shop concerns the operation of an efficient records
disposition program, preparation of records control
schedules, identification of permanent records, use
and function of Federal Records Centers, and the
relationship of records disposition to other records
management programs. Management analysts, persons
who will be serving as instructors, or those whose
duties include responsibility for control and dis-
position of records are eligible.

MECHANIZING PAPERWORK SYSTEMS (8B): A 5-day workshop
designed to help management analysts and supervisors
mechanize or automate their paperworking systems. The   Oct. 2-6,
focus is on the use of automation, but the workshop   1972
includes the use of mechanical tools when automation
is not justified. Participants determine how to locate
potential areas for mechanization in their offices
and how to develop improvements. When accepted for
the workshop, applicants will be sent a special
form ("Potential Mechanization Projects") which
must be filled out and brought to the workshop on
the opening day. These projects will be analyzed
and preliminary plans developed by the participant
during the workshop, with emphasis on the use of
Source Data Automation (SDA) techniques. Management
analysts, persons who will be serving as instructors,
or those who have direct responsibility for super-
vising systems involving paperwork or information
processing are eligible.

WORKSHOP MATERIALS

The workshop materials described below may be purchased from the National Archives and Records Service (NRP), General Services Administration, Washington, DC 20408 (Phone: (202) 963-4154 or IDS Code 13, Extension 34154). Additional information, including prices, will be furnished upon request.

RECORDS MANAGEMENT (1A) and RECORDS MAINTENANCE AND DISPOSITION (1B) WORKSHOPS

Scripts, handouts, and related materials for these workshops are available on a limited basis, only.

FORM AND GUIDE LETTERS (2A)

Instructor's Package includes materials needed by the instructor in presenting the workshop: Script, 35mm slides (27), flannelgraphs (10), and sample of student handouts.

Student's Package includes required materials for student use: 20 sets of following items -- Form Letters handbook, Guide Letters handbook, and student handouts.

CORRESPONDENCE MANAGEMENT (2B)

Instructor's Package. Workshop B Instructor's Package consists of materials needed by the instructor in presenting the PLAIN LETTERS workshop, including the script, 35mm slides (33), 8" x 10-1/2" prints of the slides, flannelgraphs (23), samples of student handouts, and instructor's key.

Also available is an Instructor's Package which may be used at the discretion of the instructor in teaching PLAIN LETTERS FOR EXECUTIVES consisting of a Lesson Plan (Script), Student Workbook, Instructor's Key, and 35mm slides (82). Additional instructional material is listed in the Lesson Plan. (The flannelgraphs used in the PLAIN LETTERS Workshop described above may be used in the PLAIN LETTERS FOR EXECUTIVES Workshop at the discretion of the instructor.)

Student's Package for PLAIN LETTERS: Required materials for students in the workshop, including Plain Letters handbook; Workbooks A, B, C, and D; Fog Index, Sample Letter; 4-S Formula; and pocket folder.

Student's Package for PLAIN LETTERS FOR EXECUTIVES: Student's Workbooks.

SPEEDING THE MAIL (2C)

Instructor's Package includes Instructor's and Student's Training Kits, 35mm slides and flannelgraphs.

Student's Package includes printed materials for student use.

FORMS ANALYSIS AND DESIGN (3A)

Instructor's Kit: Material needed by the instructor in presenting the workshop, including an illustrated script, vinyl binder, 35mm slides (133), flannelgraphs (56), and vugraphs (77).

Student's Kit: Workbooks, vinyl binder, flowchart template, and 3 handbooks -- Forms Management, Forms Analysis, and Forms Design.

FORMS IMPROVEMENT (3B)

Instructor's Package: Materials needed by the instructor in presenting the workshop, including the script, 35mm color slides (47), flannelgraphs (55), copies of Forms Improvement Log, copies of Forms Improvement Report, and samples of student handouts. Also 1 flip chart, "SMA CASE HISTORY," size 30" by 40", for one-time use.

Student's Package: 20 sets of student handouts -- Forms Improvement Kit, SMA forms (set of 7 for each student), Challenge Each Copy, filled-in Forms Improvement Report, and Simplifying Forms.

FORMS FOR AUTOMATION (3C)

Instructor's Kit: Illustrated script, vinyl binder, slides (198), and flannelgraphs (26).

Student's Kit: Workbook, vinyl binder, Port-a-Punch Cards, stylus, sponge, and 3 handbooks -- Form Analysis, Forms Design, and SDA.

DIRECTIVES SYSTEMS IMPROVEMENT (4A)

Instructor's Kit: Materials needed by the instructor in presenting the workshop, including notebook, script, 35mm slides (76), flannelgraphs (40), packet of student exercises, and student handouts.

Student's Kit: 20 sets of student handouts, notebooks, and exercises.

MODERNIZING MANAGEMENT REPORTS (5A)

Instructor's Kit: Illustrated script, 35mm slides (37), and flannelgraphs (26).

Student's Kit: Workbook

INFORMATION SYSTEMS DESIGN (5B)

Instructor's Kit: Illustrated script, vinyl binder and 35mm slides (255). Keysort instruction kit (manual, needle, jogging block, punches, correction tape, etc.) may be ordered from Automated Business Systems, Division of Litton Industries (any local office). One box Projection Transparencies No. 588 (100 sheets) may be ordered from 3M Company (any local office).

Student's Kit: Workbook, template, and Keysort term cards.

OFFICE INFORMATION RETRIEVAL (6A)

Instructor's Package: Materials needed by the instructor in presenting the workshop, including the Instructor's Manual, 35mm slides A1 - A25, B1 - B4, C1 - C179, and D1 - D38; flannelgraphs A1 - A4, B1 - B5, C1 - C25, D1 - D20, and E1 - E10; one set of previously punched hand-punched cards; Set II, optical coincidence cards; Set IV, optical coincidence cards, and one Student Kit. (In addition, instructor will need one optical coincidence display, or light box, which may be purchased directly from the manufacturer.)

Student's Package: Required materials for student in the workshop, including one Student Kit per student; one stylus per student, one 3-1/2" x 7-1/2" sponge per student, and six blank hand-punched cards (IBM Form D36915) per student. (In addition, students should be provided with 1 each of the following NARS-GSA Handbooks: Subject Filing, Files Operations, File Stations, Information Retrieval, Information Retrieval Systems, and Microform Retrieval Equipment Guide.)

FILES IMPROVEMENT (7A)

Instructor's Kit: Script, 35mm slides (94), flannelgraphs (134), mock-up boxes for a case file and a subject file, 1 student kit containing 8 problem packets and the Files Operations handbook.

Student's Package: Student kits containing 8 problem packets and the Files Operations handbook.

RECORDS DISPOSITION (7B)

Instructor's Package: Materials needed by the instructor in presenting the workshop, including the script, 35mm slides, flannelgraphs, and one Records Disposition student's package.

Student's Package: Student's package containing material for use in the workshop.

MECHANIZING PAPERWORK SYSTEMS (8B)

Instructor's Kit: Materials needed by the instructor in presenting the workshop, including an illustrated script, slides (417) and a vinyl binder.

Student's Kit: Workbook and binyl binder. (In addition, students should be provided with one each of the following handbooks: Simplified Flowcharting (and plastic template), Source Data Automation, Source Data Automation Equipment Guide, Information Retrieval, Information Retrieval Systems, Microform Retrieval Equipment Guide, Microfilm (to be published in 1973) and Computer Output Microfilm (to be published in 1973).

Agency field personnel should direct all inquiries concerning applications, scheduling, and related information about NARS technical assistance workshops to the appropriate NARS Regional Director below:

GSA Regions 1 and 2

Regional Director, NARS
General Services Administration
26 Federal Plaza
New York, NY   10007
   FTS: (212) 264-3514
   (local: 264-3514)

GSA Region 3

Regional Director, NARS
General Services Administration
Room 7016, 7th & D Streets, SW
Washington, DC   20407
   FTS: (202) 962-2455
   (local: 962-2455)

GSA Regions 4 and 5

Regional Director, NARS
General Services Administration
1776 Peachtree Street, NW
Atlanta, GA   30309
   FTS: (404) 526-5611
   (local: 526-5611)

GSA Regions 6, 7 and 8

Regional Director, NARS
General Services Administration
819 Taylor Street
Fort Worth, TX   76102
   FTS: (817) 334-2759
   (local: 334-2759)

GSA Regions 9 and 10

Regional Director, NARS
General Services Administration
49 Fourth Street
San Francisco, CA   94103
   FTS: (415) 556-3425
   (local: 556-3425)

GENERAL SERVICES ADMINISTRATION
REGIONAL OFFICES